

# REQUEST FOR PROPOSAL

A Guide for Charities



Searching for the  
**right** Professional  
support



**Charity Intelligence**

Clarity for charities

# Our Mission

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To help charities to achieve great results, making the right connections through informed choices.

# About Charity Intelligence

In 2017, Lynn Pates and Guy Davies founded Charity Intelligence with the simple aim of helping charities and not-for-profit organisations find the right professional support services.

[www.charityintelligence.co.uk](http://www.charityintelligence.co.uk) is free for charities to use and allows them to efficiently review and compare investment managers, lawyers, accountants and insurance specialists, before selecting the provider or providers to meet their needs.

With 30 years' experience helping charities transform their precious money into effective investments, we understand the financial, regulatory and governance challenges faced by the sector.



# Is RFP **right** for your Charity..?

The Charity Intelligence Request For Proposal (RFP) is a free service that helps you to easily connect your charity's requirements with the right professional support to get the best result first time using a quick and easy online tool. Here are some key considerations to help identify whether RFP is a priority for you and your charity:



You want to meet the highest standards of governance, to document a fair and transparent process in order to meet the expectations of regulators and other key stakeholders.



You want to know the right questions to ask to be able to match potential suppliers to the specific needs of your charity.



You want comparable proposals from a number of specialists, for your leadership team or board to complete a fair and objective evaluation quickly and easily.

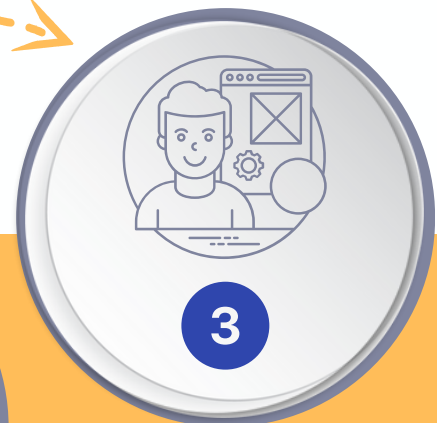
# Find the right professional partner in 3 simple steps

## 1. DEFINE

Register or log on to [www.charityintelligence.co.uk](http://www.charityintelligence.co.uk)  
Select the RFP online form to clearly define both your charity challenge and the professional support you need.

## 3. DECIDE

The report offers a clear audit trail, demonstrating the highest standards of governance and providing a way for your leadership team or board to complete a fair and objective evaluation before choosing the specialist that's right for you, quickly and easily.



## 2. DISCOVER

Charity Intelligence will send your requirements to a range of vetted potential suppliers using questions built on more than 40 years' collective experience in the charity sector.

You will then receive as many complete and comparable proposals as you require to make a clear and confident decision.

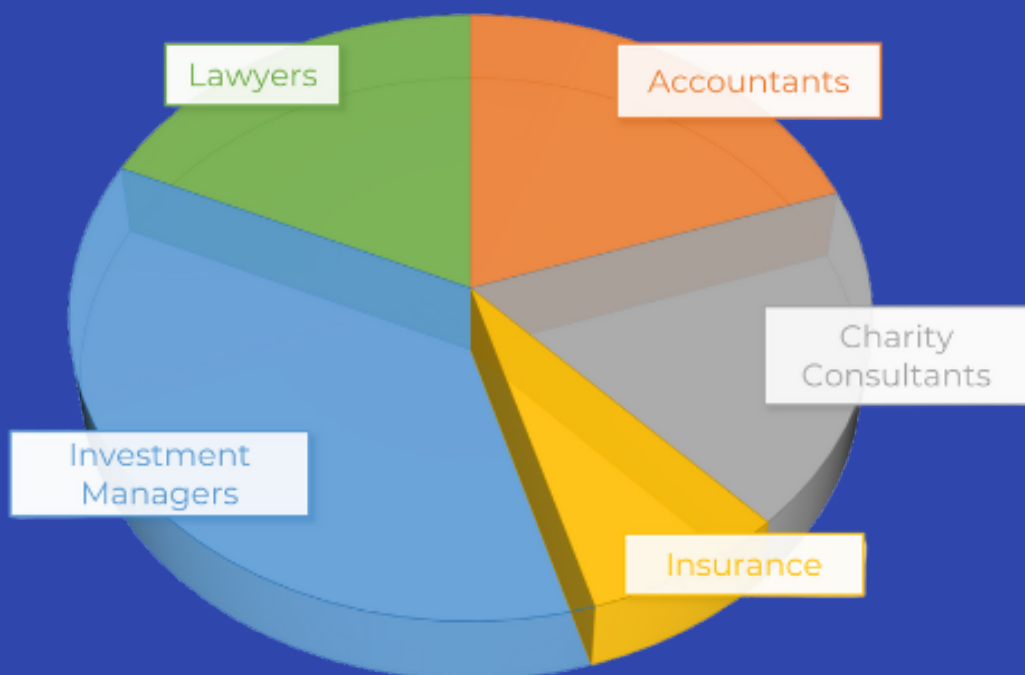
# Charity Sector Professional Partners

We understand that there are specific complexities surrounding charities that only experienced professional services can manage.

As a Trustee or senior leader with a busy schedule, having time to find the right professional support for your charity, asking the appropriate questions and receiving clear proposals to easily compare can be a challenge...

Not anymore.

Charity Intelligence has a community of vetted professional partners who understand and respond to the specific needs of the sector.



## What is a Request for Proposal?

The Charity Intelligence Request For Proposal(RFP) is a formal document with a set of questions built on more than 40 years' collective experience in the charity sector, issued to prospective Professional Partners to provide you with information on their services.

The purpose of the RFP is to collect information in an organised and compliant format enabling faster, easier comparisons to help Charities select the right vendor while minimising cost and risk.

## Why do Charities use a Request For Proposal?

There are specific complexities surrounding charities that only experienced professional services can manage, so finding the right partner who understands your needs and leverage their expertise is critical. Tendering for services in this way provides good charity governance.

## When do I need to use a Request for Proposal?

If you are looking to appoint the right specialists to help your charity achieve its goals and have the greatest impact possible, the RFP is right for you. Charities use the RFP process when they need help to get more from investments, when reviewing an auditor, for ongoing accountancy, insurance, or legal expertise and when a problem, crisis or opportunity arises.

## What information do I need to get started?

To get started it is helpful to understand and clearly describe both the outcome you are looking for and the services required by the Charity.

# Register today



charityintelligence.co.uk